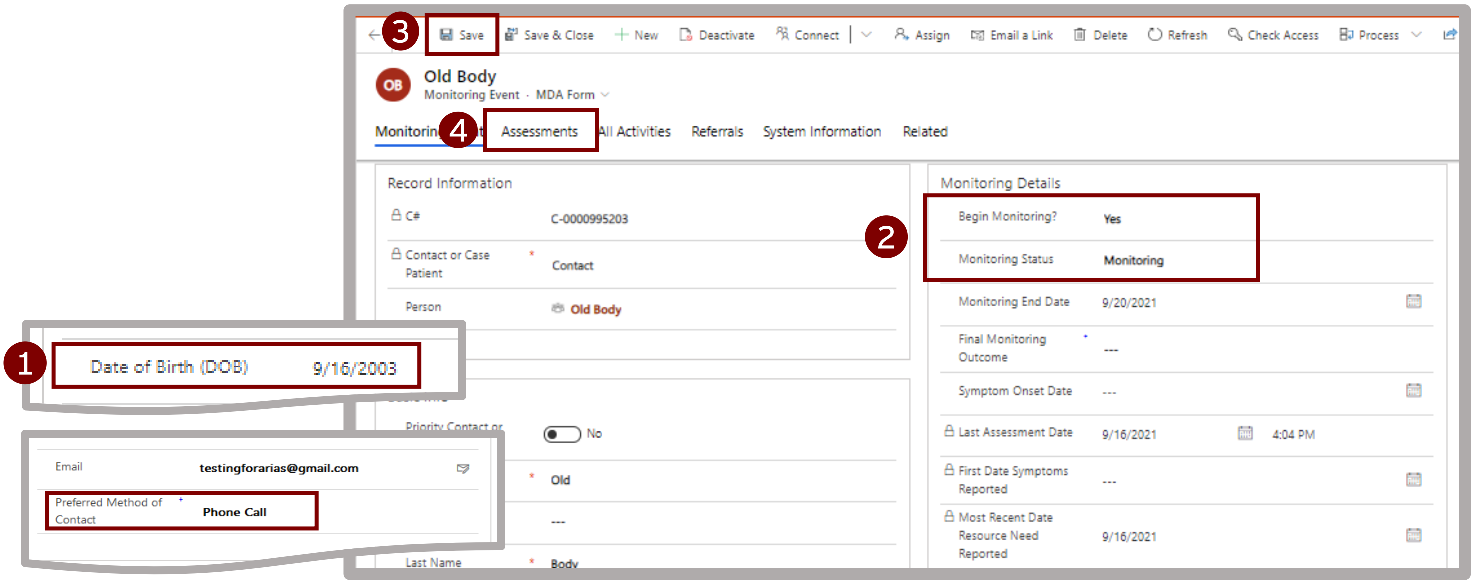
CCTO Micro-Training: Beginning Monitoring & Assessments

Beginning Monitoring & Initial Assessment

Monitoring refers to reaching out to your contact to assess their symptoms and resource needs, and it may be done digitally or over the phone. Regardless of how you are monitoring your contact, CCTO will be used to initiate monitoring and document their responses.
Note: Your contact may have already received an electronic notification from the system and opted to begin digital monitoring through the contact portal. If so, you may already see an initial assessment created or completed, and **you do not need to reinitiate monitoring.**



#1: To initiate monitoring for a contact, prepare by reviewing key information:

- **Date of Birth** may or may not contain data. Contacts use this to verify their identity when accessing digital assessments, so you will not be able to turn on "Begin Monitoring?" (which begins *digital* monitoring, i.e., auto-sending contacts daily assessment links) until you can obtain a DOB from your contact. This is okay, and you can initiate digital monitoring later. *See the last page for more info*.
- **Preferred Method of Contact** defaults to "Phone Call," and you can leave this until you determine your contact's preference. Updating this will allow your contact to receive assessments via text or email. *Note: if a contact has responded to a digital notification, they may have already updated this preference*.

#2: Then, start monitoring within CCTO: Set **Monitoring Status** to "Monitoring" and **Begin Monitoring?** to "Yes."

- **Monitoring Status** indicates if you are actively monitoring this contact.
- **Begin Monitoring?** initiates digital monitoring (see pp. 9-18 for what contacts receive) if **Preferred Method of Contact** is set to "Text Message" or "Email." It also creates a blank initial assessment regardless of **Preferred Method of Contact.** *Because a DOB is needed for contacts to access digital assessments, you will not be able to turn on **Begin Monitoring?** if a contact does not yet have a **Date of Birth**. This is okay! You should still set **Monitoring Status** to "Monitoring."*

#3: Save your work: This creates an initial assessment if **Begin Monitoring?** is on.

#4: When you are ready to collect or review contact responses, visit an assessment: Visit the "Assessments" page at the top of your contact's monitoring event.

- If **Begin Monitoring** was turned on successfully, an assessment marked "Initial" will already be created. Click into this assessment.
- If **Begin Monitoring** is set to "No," click "+New Assessment" in the top right corner of the screen.
- See the CD Manual Scripts Page for support with your contact conversation.

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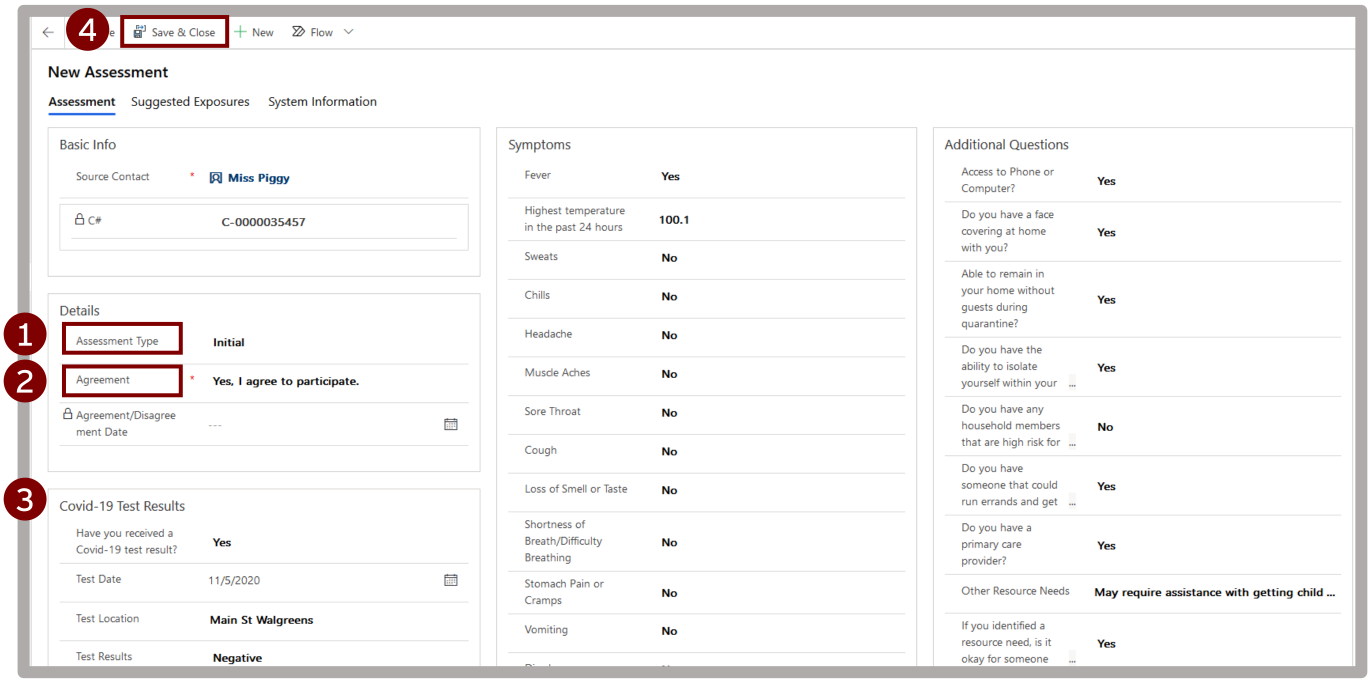
Understanding Assessment Fields & Completing a Manual Assessment

This page explains key fields that may be completed manually by the tracer (if an assessment is done over the phone) or digitally by a contact (per the next page). **Before you create a new manual assessment, check if a blank assessment is already available** per #4 on page 1:

- If this is your contact's first assessment and an assessment marked "Initial" already exists (created by turning on **Begin Monitoring?**), click into that assessment.
- If there is not an assessment marked "Initial," or if this is not your contact's first assessment, click **"+New Assessment"** in the **top right corner** of the screen.



#1: Assessment Type: This should read "Initial" if this is your contact's first assessment and "Monitoring" if it is not.

- Both types collect the same symptom and test result information.
- **Initial** assessments display a full list of resource need questions. **Monitoring** assessments ask contacts: "Do you have a new resource need?" and only request details if contacts respond "Yes."

#2: Agreement: Select "Yes, I agree to participate" if your contact agrees.

- Completing this field and saving will update the **Last Assessment Date** field on contact monitoring events (MEs).

#3: Remaining Fields: Collect per your contact's responses per the script.

- Each time ***COVID-19 Test Results*** is completed, a contact ME section for ***Contact Reported Test Results*** will appear and update. The contact ME section for ***Testing Details*** will not update automatically. Defer to your local guidance on how you should use this section.
- The first time any symptom (except "Highest Temperature in the Past 24 Hours" or "Other Symptoms") is indicated, the contact ME field for **First Date Symptoms Reported** will update.
- Each time any resource need (except "Is there any other information you would like to provide?") is indicated, the contact ME field for **Most Recent Date Resource Need Reported** will update.

#4: Save & Close: Click to save your work and record the assessment. Review this assessment at any time by returning to the "Assessments" page.

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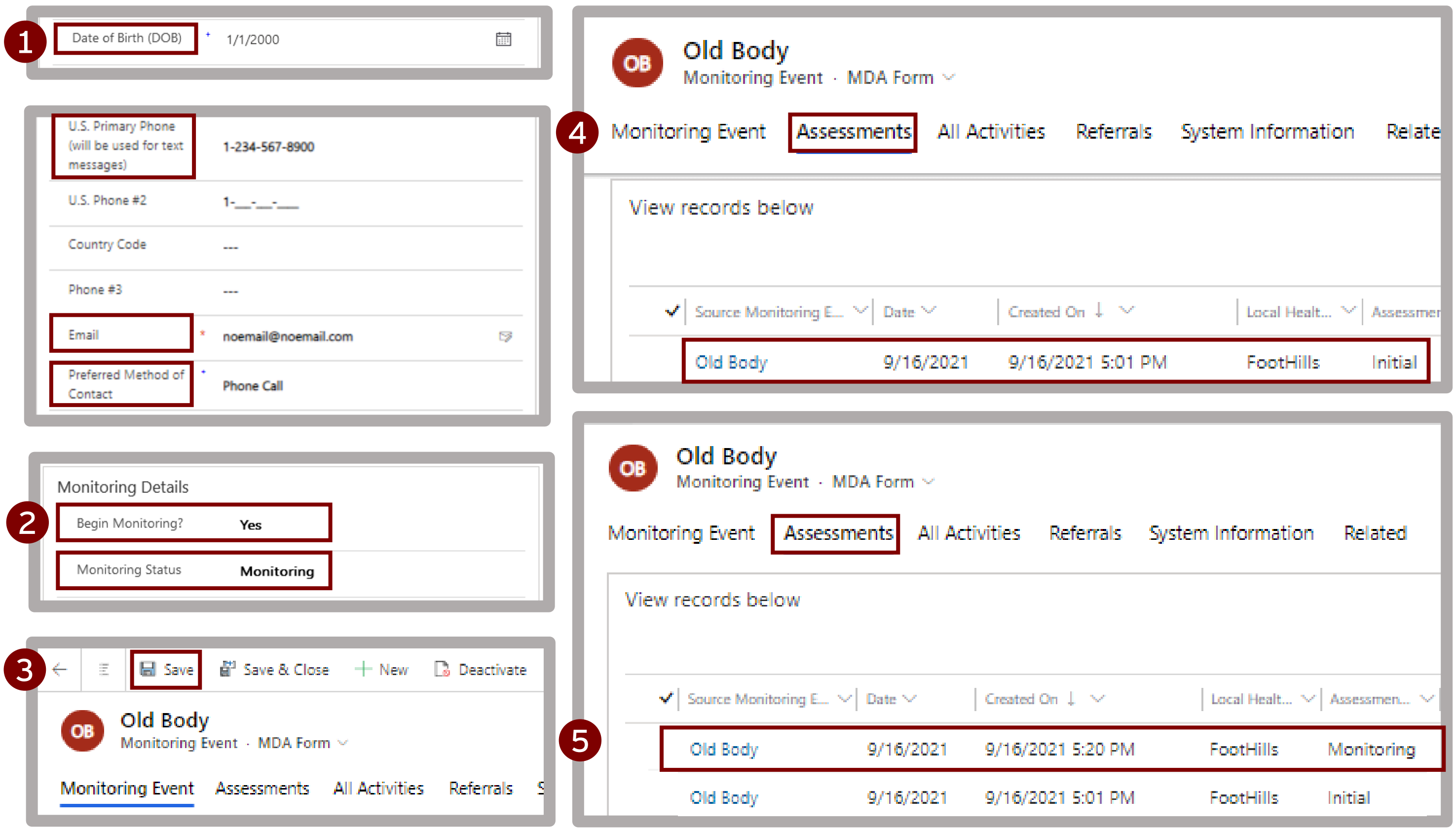
Setting Up & Reviewing Digital Assessments

Digital assessments are sent to contacts as links within automated daily texts or emails, and they can complete these assessments on their own (see pp. 9-18). **To ensure that daily digital outreach is properly turned on** and to review completed assessments:



#1: Confirm or update key information:

- **Date of Birth.** Contacts will use this to verify their identity and access their digital assessments.
- **Email** or **Primary (mobile) Phone Number** for contacts to receive assessments.
- **Preferred Method of Contact** to "Text Message" or "Email" depending on your contact's preference. This tells the system how to send assessment links.
- **Monitoring Status** to "Monitoring."

#2: Begin Monitoring?: Setting this to "Yes" turns on automatic digital outreach if you have completed the other fields properly.

#3: Save: This turns on digital outreach and sends the assessment link.

#4: Confirm creation: Click "Assessments" at the top of your contact's monitoring event to confirm that the assessment has been created.

#5: Review completed assessments: You can review any assessment completed by your contact by returning to the Assessments Page in their monitoring event and selecting an assessment from the list.